

INTRODUCTION

Since the 1950's, Seminole County has been one of the fastest growing communities in Florida. By the County's centennial celebration in 2013, Seminole County is projected to be home to approximately 500,000 residents. Most of the current residents, and those who will move here in the future, want the same thing, a desirable quality of life. Seminole County, through a series of actions, has been able to sustain a high quality of life for its residents throughout the past decade and create a destination of choice for both people and business.

The Seminole County statistics speak volumes to the effectiveness of the various programs and initiatives undertaken by Seminole County government and their respective partners.

- Top 100 school district as ranked by Money Magazine
- The second highest household income in Florida
- The third most active international airport in Florida
- The Jobs Growth Incentive grant program which has assisted 24 companies creating 9289 jobs
- Fast track permitting
- Model parks and trail system
- Property values which have increased by 32 percent during the past decade
- Largest gain in primary jobs post the 9/11 period, 1445 jobs, highest in Orlando MSA
- Seminole County bond rating consistently highest in the region
- Gained in commercial/industrial assessed property values over past decade while MSA declined overall
- Successful County wide tax increase referendums providing for the funding of additional schools/classrooms and rehabilitation of older schools, road and trail construction, libraries, and purchase of natural lands

The County's initial 1991 goals, contained in an earlier Economic Element of the Seminole County Comprehensive Plan, focused on strengthening and "recession-proofing" the economy of Seminole County through business diversification, attraction of higher waged jobs and the expansion of non-residential portion of the tax base. In 1993 when the economic development program was formally established, a tactical targeted approach was adopted which identified both types of businesses and locations within the County which offered the best opportunities for Seminole County to achieve its overall goals. In 1995, the Job Growth Incentive Program was added to provide a tool to leverage those opportunities.

The above list of accomplishments which can be attributed to Seminole County goes on and on and clearly places Seminole County in a class by itself within the Orlando MSA, if not the State. However, being on top of the mountain is one thing, staying there is quite another. **What must Seminole County do to sustain the vision and maintain the momentum to keep itself as the regional “leader of the pack”?**

Seminole County’s economic development program in the 1990s produced significant results. The program continues to be committed to the future growth and prosperity of the County. The earlier 1991 objectives have been updated to the following to guide the program.

- To Continue to Create a Great Place to Live
- To Build a Strong Business Environment
- To Communicate the Seminole County Opportunity to Target Business.

The Board of County Commissioners acknowledge that this three-fold approach deviates from a more traditional approach to economic development but the County Leaders realize that for Seminole County to continue to grow, they must not ignore the reasons people and business move to Seminole County...for its quality of life.

Issue 1 Maintain the Prominent Role of Seminole County in the Orlando Region

The Orlando regional economy has prospered based on tourism, technology and globalization. The regional road system, the international airports, the worldwide reputation of Orlando's major tourism businesses, the professional and amateur sporting events and the third largest convention center in the nation all contribute to a high profile, international presence for the Orlando Region.

The four county regional population grew by more than a third, adding over 400,000 people to the resident base during the 1990's. Over a quarter of a million jobs were added to the economy and property values in the Orlando Region increased from \$50 billion to \$90 billion. The growth is expected to continue. By 2020, it is anticipated the resident base will approach 2.5 million people with almost 1.7 million jobs.

Seminole County's regional association is important for two reasons:

- First, the Orlando Region is the home of Seminole County; and the qualitative image of Orlando reflects on Seminole County in the eyes of the world. Orlando is a strong name, this "brand" should continue to be used to the advantage of Seminole County. The strength of the Orlando name should continue to be enhanced as an important element of the Seminole County Economic Development Program.
- Second, many elements of the local economic development infrastructure system can only be provided on a regional basis. Transportation, security, health care, workforce training, water resources and cultural assets, to name a few of our needs, can best be provided by regional programs that tap regional resources. Regional communication is available through 185 miles of a fiber optic cable system within road rights of way installed by Seminole County. The cities are able to utilize the system for law enforcement activities, reducing time and resources needed to perform daily functions. Schools and the School Board can transfer information quickly and efficiently. Fiber optics can be used for coordination of traffic signals and other data throughout the region.

The role of Seminole County in the Orlando Region is an active one. The 2020 projections expect the Seminole County population to decrease as a percent of the Orlando Region; but the share of regional employment is expected to grow.

The continued integration of County and Regional activities will be important as Seminole County continues to be a leader in promoting and protecting its high standards for great neighborhoods and a strong business environment. The Seminole County Economic Development Program is designed to draw on the strengths of the Orlando Regional economy while retaining and promoting the County's own image and identity.

Issue 2 Economic Strategic Focus

As stated in the Introduction, there are three objectives to implement which support the Seminole County economic development strategy: **Continue to Create a Great Place to Live; Build a Strong Business Environment; and Communicate the Seminole County Opportunity.** These are in tune with the strengths and recent successes of Seminole County. Each objective has distinct strategic action which are reflected in the policies later in this Element.

Continue to Create a Great Place to Live

Seminole County is a great place to live and will continue to improve through on-going community building activities of government, residents and businesses that result in:

- Strong desirable neighborhoods;
- Excellent schools and continuing education programs;
- Attractive activity and shopping areas;
- Cultural and Historic Heritage Programs
- Beautiful streets and open spaces;
- Inviting parks, trails and recreation areas;
- Effective infrastructure; public services and facilities;
- Responsive public safety programs;
- Accessible health care;
- Abundant natural resources;
- Informed residents;
- Diversified, creative workforce;
- Growing personal incomes; and
- Progressive governments.

In the next ten years, the competition for industry relocations will increase; the basis for the competition will continue to shift from cost-based factors such as facility costs and other costs of production to manpower related costs. The successful small, high value firms will need skilled, talented and creative people. In the economy of today, businesses follow people. Therefore, an important element of any economic development plan is to create a place that attracts talented and creative people. High value businesses will follow. Talented and creative people want choices of where to live. Business resources are important for recruiting new businesses, and other factors, such as schools, first rate housing options and cultural facilities, will become more important to key employees and their families.

The strategy for Seminole County is to continue to be a great place to live and to have a comprehensive network of support services for new and small businesses that build a strong business environment. The fundamental objective of the Seminole County

Economic Development Program is to continue to work with residents and businesses to make Seminole County a great place to live. This is essential to recruit and retain businesses with high paying jobs and to attract employers with high value skills. Implementation of other directives from the other Elements of Vision 2020, i.e., the Design Element, the Recreation and Open Space Element, go hand in hand with efforts to continue to make Seminole County a great place to live.

Build a Strong Business Environment

The Economic Development Program formulated in 1993 built upon policies in the 1991 Seminole County Comprehensive Plan. The 1993 Program outlined five strategic actions that are still valid, and part of the County's Strategic Plan:

- Identify the types of businesses that will meet the County's goals (the concept of Target Industries to be discussed in detail in Issue 4);
- Convince these businesses to locate within the County (Recruiting);
- Help local businesses start-up or expand (Small Business Development and Retention);
- Provide the public infrastructure necessary to support economic development (Infrastructure); and
- Provide incentives or remove disincentives to attract companies that will add value to the local economy (Job Growth Initiative to be discussed in detail in Issue 4).

Private and public investments over the past decade have reflected a broad base series of successful endeavors ranging from an aggressive program to purchase natural lands to effective incentives to lure new employers to the County. Improvements ranged from an increase in parks and sports facilities to the new Orlando Sanford International Airport terminals to two new regional shopping malls. The range and significance of private and public investments was profound. The events of the last decade are listed below and have been instrumental in "setting the stage" for recruiting new employers and providing a high quality of life for Seminole County residents.

- Bond referendum passed for the purchase of environmentally sensitive lands in 1990;
- Bond referendum passed for the 1 cent sales tax for transportation in 1991;
- East Seminole County Rural Area Plan adopted in 1991;
- County Wicklow, Ireland, Economic Development partnership established in 1992;
- Seminole County's Olympic soccer training facility opened in 1992;
- Seminole Softball Complex opened in 1993;
- Seminole Towne Center Mall opened in 1994;
- International Terminal opened at the Orlando Sanford International Airport in 1994;

- Casselberry CRA established in 1995;
- Sanford Towne Center and Downtown Waterfront CRA's established in 1995;
- Oviedo Marketplace Mall opened in 1997;
- US 17/92 Community Redevelopment Agency established in 1997;
- Cross Seminole Trail opened in 1998;
- Seminole Technology Business Incubation Center established in 1998;
- Seminole Wekiva Trail opened in 2000;
- Bond referendum passed for recreation trail network to include second phase of purchasing environmentally sensitive lands in 2000;
- Seminole Community College, Oviedo Campus opened in 2001;
- Orlando Sanford International Airport, Domestic terminal opened in 2001;
- The Foreign Trade Zone Designation in 2001;
- Ten Year Road Improvement Program completed (55 miles of roads at \$450 million);
- Bond referendum passed that reauthorized a 1 cent sales tax for transportation and education in 2001 and
- Economic Development Plan for the Orlando Sanford International Airport completed in 2003.

Communicate the Seminole County Opportunity

The economic success of Seminole County depends on the information and image marketed to a host of different sources. A concise image portraying the opportunity of growth and success of target industries will be communicated by the Economic Development Department. The County shall continue to promote a pro-business image locally, to the region and worldwide through the printed word, electronic innovations, partnerships and outreach programs.

Through the Economic Development Program the County will initiate and foster necessary relationships that will provide resources to communicate and strengthen important business tools to a broad audience. Our regional partnerships are key ingredients to building an economically successful forum and providing quality of life aspects that attract target industries and key employees.

Issue 3 Property Tax Shift from Residential to Non-Residential Properties

As a traditionally suburban community, homeowners have shouldered most of property tax burden. During the 1990's, the growth and success of retail, office and industrial businesses created jobs and incomes; this growth also created an increase in the business portion of the tax base. Residential property values increased by 73 percent from 1990 to 2000 as values rose from \$7.3 billion to \$12.8 billion. Non-residential values increased 72 percent over the same period. (*Exhibit ECM Assessed Property Values*)

The experience of the 1990's demonstrates that a decade is not enough time to reverse a fifty year trend of residential success. The history and success of Seminole County as a high-value residential market prevails. The fact that the business portion of the tax base remained at 25 percent is a tribute to the extraordinary efforts made by the County to promote economic development during the 1990's.

The significant growth in jobs, non-residential property values and businesses in Seminole County in the 1990's was necessary to maintain the 1990 balance of residential and non-residential property values. A continuing effort is required to actually shift the long-term trend.

"Build-out" is the phenomenon that will change the trend. Residential "build-out" in the urban area is approaching and high value residential construction will diminish as the dominant force in determining the character of Seminole County. Some undeveloped parcels of land will still exist in the urban area, but they will be scarcer and smaller in size. Redevelopment of obsolete properties, particularly non-residential properties, will become more prevalent. Intensification in the targeted areas and the cores of the cities will become more common. Growth will still be a major factor in Seminole County; its form and style will be different, and in the long run, it is anticipated that the a shift will occur where non-residential properties will gain a stronger percentage hold of the tax base.

Issue 4 Target Areas, Industries and Occupations

The Seminole County Economic Development Strategy Plan identifies three primary target areas for economic growth, lists Target Industries and identifies Target Occupations that result in high wage jobs. This Target Approach will attract and support quality jobs and secure above average wages for residents while strengthening the County's economic base.

As discussed in Future Land Use Element Issue 2, Target Areas are primarily found in the Higher Intensity Planned Development (HIP) land use and implemented through policies and regulations that address uses, location, services and facilities, density/intensity and is a tool for discouraging urban sprawl. The Target Areas designated below share these criteria. The stated purpose for HIP land use in the Policy FLU 5.6 is to provide a mixed use category which utilizes an aggressive strategy to attract specific Target Industries.

Target Areas

The Three Target Areas selected for economic development all have strong business-oriented traits. Each has immediate access to the regional highway system and access to both the Orlando Sanford International Airport and Orlando International Airport. Each Target Area as shown in *Exhibit ECM – Target Areas*, is dedicated to improving the infrastructure system including utilities, communications and educational facilities. Each Target Area has access to a variety of housing opportunities and price ranges. In addition to these Target Areas, each city has a downtown or economic zone which supports economic growth.

The three Seminole County Economic Target Development Areas are:

- **North I-4/ Lake Mary** – The area includes three interchanges with Interstate 4, access to the Greenway (SR 417), infrastructure and available sites for new development. In 2000, there were nearly 1,500 acres of vacant commercial or industrial lands. Many high-tech related businesses have moved into the area resulting in a tremendous growth in building space and property values. Property values for retail, office and industrial buildings grew from \$210 million to over \$710 million from 1990 to 2000;
- **Orlando Sanford International Airport** – The Airport is strategically located to foster growth and is a strong economic engine for the County and City of Sanford. There are almost 160 acres of vacant land available at the Airport with additional vacant lands available in the vicinity. There is an approved master plan for the Airport that depicts the future development. The new terminal and upcoming federally funded improvements to the runways help keep the airport competitive in drawing international business. The Airport serves international tourism and recently received Foreign Trade Zone status; and
- **US 17/92 Corridor** – This corridor is located in the heart of Seminole County and connects Sanford with Maitland and Winter Park to the south. The County has designated the corridor as a Community Redevelopment

Area and has a host of programs designed to accommodate redevelopment and new economic development. The County is looking to prepare a unified Development Framework for the segment between SR 436 and the Orange County line to plan for master utility and stormwater improvements and upgrading of the US 17/92 corridor. These efforts will hopefully be a catalyst for urban redevelopment along the corridor.

Each of the three target areas has immediate access to the regional highway system; each has excellent regional access to the both the Orlando Sanford International Airport and Orlando International Airport. Each has plans for the continuing improvement of the infrastructure system including utilities, communications and education facilities. Each Target Area is also close to excellent neighborhoods with homes in a variety of price ranges. In addition to the three areas in Seminole County, each city has a downtown or economic zone positioned for business growth. The County and the cities have cooperative programs for economic development.

High Tech Target Industries are defined by Seminole County and listed in the 1993 Plan. They are:

- Research Development and Testing;
- Space Technology, Aviation and Aerospace;
- Simulation, Modeling and Training;
- Laser Technology;
- Robotics;
- Computer Software;
- Computer Hardware;
- Medical Labs and Technology and
- Communications.

These industries are relevant today and fit in with the community minded approach that has sustained Seminole County in the past. *Exhibit ECM Target Industries* includes this list along with other identified High Tech Industries.

The decade of the 1990's saw substantial growth in jobs within Seminole County. Over this decade the job per person ration increased by 20 percent, expanding from 0.425 to 0.513 jobs per capita in 2000. The total number of jobs is expected to grow from 187,000 in 2000 to 252,000 jobs in 2020. This projection reflects a growth in retail trade and service jobs by 40 and 45 percent respectively. Although these industries do contain some high tech jobs, the focus of the County is to continue to target high tech industries to provide high paying jobs.

Target Occupations

There are "high tech", high wage jobs in every industry. The County has targeted the higher wage jobs as the ones to recruit and retain through its economic development programs (*Exhibit ECM Employment by Occupations.*)

Agriculture, construction and retail trade businesses have jobs that require technology skills, specialty skills and qualifications that demand high wages. The County includes the following occupational categories and included them into the criteria for supporting selected businesses and industry

High tech and high value job classifications are:

- Executive, Administrative and Managerial;
- Professional, Paraprofessional and Technical, and
- Precision Products.

The Professional category is the largest occupation within Seminole County and it is expected to grow. In 2000, approximately 19 percent of the workforce in Seminole County consisted of the jobs within the Professional category. In 2010 this number is expected to rise to 52,000 jobs or about 20 percent of the workforce. (*Exhibit ECM Employment by Occupation*)

The continued focus on Target Industries, supplemented with the Target Occupations, provides a framework for selecting the businesses to promote and pursue in Seminole County.

Issue 5 Higher Intensity Planned Development Areas

To assist in Economic Development efforts in the early 1990's, the Seminole County Comprehensive Plan was amended to plan for Higher Intensity Planned Development Areas in the County. Per Future Land Element Policy 5.6, the Higher Intensity Planned Development (HIP) land use designation was designed as a mixed use category which combines an aggressive strategy to attract specific **target industry**, minimize urban sprawl, provide affordable housing opportunities, and alternative transportation strategies. Not only was the land use category to provide an incentive for high density residential development/affordable housing but it was designed to:

- Promote the development of target industries that will provide jobs in close proximity to the County's existing residential areas, support future mass transit systems and make the most efficient use of the County's substantial investment in infrastructure and services;
- Promote target business development in close proximity to the regional road network providing high visibility and convenient access; and
- Ensure sufficient availability of land to realize the economic development goals of the County.

As stated in Issue 4 - Target Areas, Industries and Occupations, there are three Economic Target Areas: North I-4/ Lake Mary area, Orlando Sanford International Airport (located primarily in the City of Sanford) and the US 17/92 Corridor. Particularly in the North I-4/Lake Mary area, the County has over the past 10 years invested funds in public infrastructure to successfully promote the establishment of target industries in this targeted area. The County has funded water and sewer improvements, water plant expansion, the Northwest Regional Wastewater Treatment Plant, water and sewer lines, and the construction of the four laned North International Parkway at a cost of \$12 million dollars connecting CR 46A with SR 46. Rapid development has occurred in the North I-4/Lake Mary area in unincorporated Seminole County and in the Cities of Lake Mary and Sanford.

What is of concern to the County is that in the HIP land use areas, particularly in the North I-4/Lake Mary target area high or medium density residential development, apartment units, has occurred in greater numbers than anticipated, consuming land for uses other than the intended target industries. County Staff has studied the trends of development in the use of HIP districts and found that rental apartment developers prefer vacant parcels twelve acres or larger in size for constructing apartment complexes. Of the vacant 1090 acres in the HIP land use category, there are 16 vacant parcels greater than 12 acres and 137 vacant parcels under 12 acres in size. The current breakdown of residential and non-residential HIP acres is as follows:

HIP ACRES	Total	Residential*	Non-Residential	Percent Res / Non-Res
Developed prior to HIP (1991)	537	451	86	84% / 16%
Developed since HIP	263	140	123	53% / 47%
Total developed	800	591	209	74% / 26%
Remaining vacant gross developable	1090	* Typically these are A-1 zoned parcels with a house that are potentially redevelopable		

The concern of the County is that the remaining large vacant HIP parcels will be developed as rental apartments, pending the market, but the County should be ensuring that these remaining large vacant parcels are reserved for target industries. The County should look to amend policies in the Future Land Use Element to ensure that the HIP related policies are aimed at preserving large vacant HIP parcels for targeted industries.

Issue 6 The Importance of Small Businesses and Tourism

Small Businesses

The importance of large employers is acknowledged. However, small businesses remain the strength of the Seminole County economy. Small businesses are the source of entrepreneurship; small businesses are the ones that can foster increased use of technology in general business practices, small businesses sometimes become large businesses, small businesses participate in community activities and small businesses are easier to start than large ones.

In addition, small businesses account for the vast majority of enterprises in Seminole County. In 1990, 1,996 (57 percent) of the County's 3,518 business establishments employed less than five people. In 2000, 6,241 (58 percent) of the total 10,723 businesses in Seminole County were still in this category. The number of businesses grew over 70 percent and they remained predominately very small enterprises. (*Exhibit ECM Target Industries*) The growth and prosperity of small businesses is important to the economy of Seminole County. County support for the programs through Seminole Community College, the U.S. Small Business Administration and the Seminole County Public School system is very important.

Seminole County supports the Seminole Technology Business Incubation Center, the Central Florida Business Incubation Center and the Small Business Development Center. These efforts have helped many small businesses to gain self sufficiency and moved on to be successful businesses and employers in Seminole County.

Small business and the success of small businesses in Seminole County are intertwined with programs to recruit high technology firms, to expand tourism and to promote international trade. Assisting with the development of business skills, improving sources of business financing, easing of regulations to facilitate small business success, such as, home occupations, and promoting the County, as a pro-trade community will improve the

business environment for entrepreneurs who will continue to build small businesses in Seminole County.

Tourism

Tourism in Seminole County is important for two reasons. First, tourism increases the number of business hotel and restaurant patrons and supports the entertainment, sport and recreational park venues in the County. Second, tourism is a potential source of future residents and businesses. Studies prepared by the State of Florida indicate that a positive first impression of a community for visitors often results in return business trips to the area in the future. If visitors are impressed with an area as a nice place to live combined with an appropriated business environment, they will consider the community when future business relocation decisions are made.

Tourism support businesses serve the tourism industry regardless of where the tourists are. These businesses include those associated with the Orlando Sanford International Airport where charter flights bring in international tourists who may not stay in Seminole County but rent cars or other services that can be obtained at the airport terminal.

Eco-tourism is making big news in Seminole County with such amenities as the Wekiva River and the springs at the Wekiva State Park, airboat rides on the larger lakes, trails, kayaking or canoeing the rivers in the County. Because of the natural beauty found in the County and the efforts to preserve this beauty, eco-tourism will continue to grow and become a vital part of the Seminole County experience.

Issue 7 Public Infrastructure

Public investment in “infrastructure” (airports, roads, water and sewer, schools, libraries, parks, trails, etc.) has always been a key requirement for economic development. A raw piece of land may be in the best business location in the world, but without the necessary public infrastructure it will never develop. The availability of public facilities and services will continue to be of critical importance for economic development. The main guide of the County’s infrastructure investment program is the long-range Capital Improvement Program (CIP) which sets out a five year capital program to support County needs and growth.

Part of the success of the Economic Development Strategy is the voter supported tax programs as reflected in the list below. Six times in the last two decades, the voters agreed to raise the taxes for specific purposes. Initiatives passed by the voters include:

- Library system in 1982
- Jail expansion in 1987
- Purchase of environmentally sensitive lands in 1990
- 1 Cent Sales tax for transportation in 1991
- Recreation trail network and phase 2 of the purchase of environmentally sensitive lands in 2000 and
- 1 Cent Sales tax for transportation/education infrastructure in 2002

The first 1 Cent Sales tax for transportation in 1991 resulted in 35 road projects of which 29 were major road projects, such as the four laning of Tuskawilla Road, and six transportation operations and safety projects. From the monies of the first referendum, 86 miles of roadway were improved meeting the state concurrency requirements and allowing development to occur.

Also a major contribution to the County’s Economic Development Strategy has been the provision of major highway improvements by the Florida Department of Transportation, both District 5 and the Turnpike Enterprise, for the limited access facilities in Seminole County. A replacement bridge over the St. John’s River Bridge is currently under construction to be followed by the six laning of I-4 from Lake Mary Boulevard to the bridge. In a cooperative effort between the Turnpike Enterprise and the Seminole County Expressway Authority, the “missing link” of SR 417 (the Greenway) was completed between I-4 and US 17/92, thus completing the Eastern Beltway from I-4 north of Orlando to I-4 south of Orlando. The late 1990s saw the completion of the six laning of I-4 from SR 434 to Lake Mary Boulevard and the new I-4/CR 46A interchange was constructed.

In 2001, the U.S. Department of Commerce approved the Orlando Sanford International Airport’s application authorizing establishment of a Foreign Trade Zone. The 2,435 acre Free Trade Zone is one of the largest in Florida and includes, in addition to the airport, the following industrial parks: Technology Park in Lake Mary, Port of Sanford, Northstar Business in Sanford, Silver Lake Industrial Park in Sanford, Sanford Commerce Park, Sanford Central Park and Oviedo Business Park. The County is

currently constructing the extension of East Lake Mary Boulevard/Silver Lake Drive which will increase the accessibility to the airport, provide additional access from SR 46 and Volusia County to the north and by extending Lake Mary Boulevard making it easier for airport related traffic to access both the Greeneway (SR 417) and I-4.

Twenty-five percent (25%) of the one cent sales tax passed in 2002 will go to the Seminole County School Board for capital improvements to existing schools and help fund new schools. The School Board is anticipated to receive \$133 million from the sales tax for schools.

Issue 8 Business Incentives

Seminole County is committed to providing the best possible business environment for Target Industry and Business expansions and relocations. The Jobs Growth Incentive Trust Fund, Customized Job Training Programs and the Rapid Response Team are services the County provides to assist business location and expansion needs.

- The Jobs Growth Incentive Trust Fund provides monetary incentives for qualified target industries and businesses. The funds may be used to offset relocation expenses, impact fees, permitting and any other legitimate business costs. Applicant companies must demonstrate the creation of high paying jobs and substantial capital investment to be eligible to receive funds. The incentives are awarded on a case-by-case basis by the Board of County Commissioners.
- The Customized Job Training Program offers free job training to qualified companies and employees. Customized Training is provided through the Corporate College at Seminole Community College.
- Once a decision is made to locate in Seminole County, the Rapid Response Team, comprised of Seminole County staff, will hold pre-application meetings with company representatives and fast track site plans, building permit approvals, and all inspections. Additionally, no fees need be paid until the Certificate of Occupancy is issued.
- All incentive applications, both State and County, are coordinated through the Metro Orlando Economic Development Commission and the Seminole County Economic Development Department to insure a seamless process for the applicant company.

Among other factors, the US 17-92 CRA was established to provide a framework for addressing specific issues related to the existing built environment along the corridor. Most of the parcels (over 60%) are smaller parcels, having been developed prior to contemporary land development regulations and affected by road improvements and evolving land development regulations. Successful redevelopment of such properties typically would require intensification or increases in lot coverage and provision of water and sewer, which results in challenges in meeting the current standards for setbacks, landscaping, parking, open space, and stormwater management. These redevelopment challenges often times result in a disincentive for redevelopment.

Issue 9 Strengthen Workforce Development

The County and its citizens will benefit from the creation of a well-trained and competitive workforce from which Target Industries can draw skilled employees. This focus will attract new businesses to the County and improve the employment value of the individual citizen. Broad educational prospects also contribute to the quality of life available in the County and bring the resources of quality, flexibility and knowledge to the Seminole County economy.

Educational opportunities throughout the County will be strengthened by positive relationships among the education community, the public agencies and the business

community. The Economic Development Department has the ability to bring together Seminole County Public Schools, Seminole Community College, University of Central Florida and Workforce Central Florida to identify methods to improve existing programs and offer new ideas to build a globally competitive workforce.

Issue 10 Employment Opportunities in Community Development Block Grant Areas.

Community Development Block Grant Areas are areas of concern within the County. The Community Resources Division provides financial support to allow people to invest in themselves with technical and vocational training.

The funding of Business Incubators located at the Port of Sanford and the Orlando Sanford International Airport provides a forum for small businesses to grow and develop within the County. Public investment in economically challenged areas will allow local businesses to be established, sustain small communities and contribute to the overall economic strength of the County.

The County shall continue to bring employment opportunities and technical assistance into the identified areas, provide public infrastructure and mass transit connections and provide job training.

Issue 11 Agricultural Economics in Seminole County

Agriculture was one of the first businesses in Seminole County. The citrus boom of the mid to late 1800's brought many immigrants to the area enticed by Mr. Sanford's promise of land in exchange for labor. The great freeze of 1894 and 1895 destroyed the citrus groves and farmers searched for a product that could provide quicker incomes until the citrus crops could be re-cultivated. Vegetables, mainly celery, became the major agricultural product for Seminole County until the 1970's.

Today agriculture is responsible for approximately 36 million dollars in economic activities for Seminole County. The major commodities of the area are ornamental crops, citrus, livestock and vegetables. Ornamental crops have the largest share of the agriculture industry throughout the county. It includes tree farms, nurseries, indoor foliage and landscaping materials.

The economics of agriculture have played an important role in the formation of Seminole County. It is part of the history and culture of the region as well as an economic force. Although the agricultural industry has diminished in its impact to the county's economic base as the County became more urbanized, over the past five years it has remained constant. The County shall provide necessary economic support to maintain the existing agricultural activities, such as, ensuring that there is an adequate roadway system to support freight movements.

ECONOMIC ELEMENT

GOALS, OBJECTIVES AND POLICIES

GOAL

The County shall continue to be committed to its future growth and prosperity by attracting business investments and high wage job growth. The creation of a strong identity for Seminole County in a regional setting and actively supporting regional economic development infrastructures will allow the County to benefit from the worldwide strength of the Central Florida region and increase our local economy. The Economic Development Program of the County will continue to carry out its objectives to create a great place to live that will attract economic prosperity; build a strong business environment and communicate the Seminole County opportunity to targeted businesses.

OBJECTIVE ECM 1 MAINTAIN THE PROMINENT ROLE OF SEMINOLE COUNTY IN THE REGION

Policy ECM 1.1 Strengthening Regional Involvement

- A The County shall continue to support the regional economy and utilize the strength of the Orlando brand name worldwide. The County shall increase its presence in the region by promoting its own unique image and identity.
- B The County shall continue to sustain the local economy by supporting the regional infrastructure systems including the road system, the Orlando Sanford International Airport, the communication systems including the fiber optic network, workforce training, water resources, security, health care, and cultural assets which can be best provided by regional programs.
- C The County will continue to partner with the Metro Orlando Economic Development Commission in promoting the location of corporations in Seminole County and on international trade missions and related activities that highlight the benefits of the Seminole County economy to international investors and businesses.

OBJECTIVE EMC 2 MAINTAIN THREE FOCUSED ECONOMIC DEVELOPMENT STRATEGIES FOR ECONOMIC SUCCESS AND ENHANCED QUALITY OF LIFE

Policy ECM 2.1 Creating a Great Place to Live

To attract a creative workforce that target businesses require, the County shall continue to promote quality communities that include a diversity of housing opportunities, a strong school system, vital activity centers and natural recreational amenities.

A Implementation of the Vision 2020 The County shall continue to implement, review and update the Comprehensive Plan which embodies the definition of quality of life and performance measures for County services and facilities. In that regard the County will:

- 1 Continue to provide high quality educational systems and invest in cultural and heritage programs; and
- 2 Continue to enforce Design Element policies guiding well designed roadway corridors and open spaces and protecting neighborhoods; and
- 3 Continue to invest in land acquisition to create inviting parks, trails and recreational areas; and
- 4 Continue to ensure the availability of accessible health care, responsive public safety programs, and effective infrastructure to all residents.

B Foster Strong Neighborhood Organizations Neighborhood organizations are the building blocks for strong communities. The County shall continue to maintain communications with these groups as a way of disseminating information and reaching consensus. In that regard the County will:

- 1 Maintain a listing of Homeowner Associations, Neighborhood Associations and other community groups; and
- 2 Provide the tools necessary for public engagement including pamphlets, available speakers and contacts to the County; and
- 3 Protect neighborhoods from adverse impacts of development.

C Encourage Vital Activity Centers to Increase the Quality of Life, to Attract Businesses and to Attract a Qualified Workforce Activity centers shall be economically successful by being attractive, pedestrian friendly and allow for a variety of uses including shopping, recreation and cultural activities. In that regard the County will:

- 1 Foster the development of aesthetically pleasing mixed use activity centers in selected places including the Target Areas throughout the County and cities as described in Vision 2020; and
- 2 Assist downtown community redevelopment agencies and private developers interested in creating activity centers and town centers with a mix of uses, pedestrian orientation, design standards and multi-modal transportation systems; and

- 3 Create an inventory of desirable uses for these centers that will create economic success and attract a professional workforce; and
- 4 Form partnerships with the Cultural and Historic Organizations to add dimension and value to commercial centers, create a sense of place and help define the unique Seminole County image within the region.

D Public Services Coordination The County shall continue to include the Seminole County's Sheriff's Office and Seminole County Public Schools in the planning process by inviting input from both parties in planning and land development review activities and in the public hearing process.

Policy ECM 2.2 Build a Strong Business Environment

- A The County shall continue to actively promote public and private investments within the County which add lasting value to the community. Voter supported tax programs have proven to raise the quality of life by allocating money for roads, schools and trails.
- B The County shall continue to improve the development corridors to facilitate their transformation into places that are economically, socially and physically successful. The County shall continue to formulate a redevelopment plan for all gateway corridors in Seminole County; and
- C The County shall continue to promote international trade by incorporating the facilities, programs and processes, information and infrastructure related to international trade into the strategic plan of the County. In that regard the County will:
 - 1 Monitor growth/decline of airport operations, number of passengers serviced, amount of cargo processed and the square footage of buildings leased in the Foreign Trade Zone.
 - 2 Maintain the existing international relationships with County Wicklow, Ireland and the Navarre and Basque regions of Spain by increasing the number of contacts, the amount of press coverage and events with international partners.
 - 3 Increase the County's involvement with Metro Orlando Economic Commission on international trade missions and other activities which highlight Seminole County as a strong international business center by tracking website hits and contacts from offshore businesses.
- D The County shall maintain Partnerships with Seminole Community College/Small Business Development Center, the University of Central Florida, other colleges in the area, and the local Chambers of Commerce to provide technical business assistance and growth opportunities.

Policy EMC 2.3 COMMUNICATE THE SEMINOLE COUNTY EXPERIENCE

Economic development depends upon decision makers having the proper information as they decide to expand existing businesses, to move businesses to Seminole County and to

recruit a quality workforce. Information and communication about business opportunities in Seminole County are crucial.

Enhance the Business Image of Seminole County

- 1 Develop a communication system with websites, printed materials, local hosts and ambassadors to promote Seminole County as a vital business center. Adopt, by 2006, a communication program and budget.
- 2 Create a distinct and consistent image that portrays the County as a viable business location. Evaluate and update as necessary, existing promotional materials reflecting the Seminole County “brand”.
- 3 Create an inventory of local venture capitalists and financial institutions who are interested in serving new and small businesses in Seminole County. Catalogue and increase the number of contacts between the County, the firms in the incubators and locally active venture capital firms.
- 4 Develop and maintain distribution list for materials that communicate the image of Seminole County.

Strengthen Local Business Networks

Identify, catalogue and contact local financial companies to support and educate local businesses.

Strengthen Regional Business Networks

The County will:

- A Continue to work closely with Enterprise Florida, Florida High Tech Corridor Council, Chambers of Commerce and Metro Orlando Economic Development Commission.
- B The County shall continue to work with the local cities and participate in activities such as the US 17/92 Community Redevelopment Agency to promote the assets and opportunities of the County to prospective businesses.
- C Prepare an annual report tracking the number of contacts made between the County and the Port of Sanford, Sanford International Airport, Seminole Community College, Seminole County Public Schools and prospective employers.

OBJECTIVE 3 CONTINUE TO SHIFT PROPERTY TAX DEPENDENCE FROM RESIDENTIAL TO NON-RESIDENTIAL PROPERTIES

Policy 3.1 The County shall continue to take actions to increase the non residential tax base and reduce dependency on homeowners for local revenues by implementing economic strategies. Monitor the increase or decrease in residential property values and non-residential property values; and

Policy 3.2 The County shall continue to monitor the balance of residential and employment opportunities in order to maintain equilibrium between the tax bases.

Policy 3.3 The County shall continue to review and revise regulations and processes as necessary to facilitate quality, high value redevelopment projects.

OBJECTIVE 4 TARGET AREAS, INDUSTRIES AND OCCUPATIONS

Target Areas, Industries and Occupations are the three components of the Target Approach of the Economic Development Plan. The County will continue to focus on these key factors that will attract and support quality jobs, provide higher than average wages and strengthen the economic base of the County.

Policy ECM 4.1 Target Areas

- A The following areas as shown on *Exhibit ECM Target Areas* are identified as areas to implement an aggressive strategy to attract specific industries which deliver economic growth:
 - 1 The North Interstate 4 Technology Area,
 - 2 The Sanford Orlando International Airport and
 - 3 The US 17/92 Commercial Corridor.
- B The County will increase the values of property in these areas by investing in the necessary infrastructure and facilitating quality development. Track the square footage of appropriate uses within Community Redevelopment Areas, Target Areas and municipal downtowns and activity centers.
- C The County will promote the development of Target Areas to provide jobs convenient to existing residential development, support mass transit and make the most efficient use of the County's substantial investment in infrastructure.
- D The County will maintain the balance of employment and residential opportunities within targeted areas by supporting the goals of the Future Land Use Element of the Seminole County Comprehensive Plan.
- E The County will review and revise, during the Evaluation and Appraisal Report process as necessary policies relating to HIP Design Standards located in Policy FLU 5.13 for efficiency and applicability to Target Areas and Industries.

Policy ECM 4.2 Promote Economic Developments in Target Areas through Urban Infill and Redevelopment

- A In an effort to promote a strong economic base, preserve the quality of life, and decrease costs associated with extending urban services, the County shall encourage infill development and redevelopment and business growth in the Target Areas of the County and economic activity centers of its cities.
- B The County shall review and update as necessary Comprehensive Plan policies during the Evaluation and Appraisal Report to promote Higher Intensity Planned Development land use categories to provide economic growth as intended. Strengthen related policies to ensure that lands dedicated as economic zones are not underutilized. Investigate the use of incentives to promote owner-based residential infill and redevelopment outside target areas.
- C The County shall review and update as necessary Land Development Code regulations for site design standards for mixed use and activity centers to ensure quality development promoting pedestrian orientation, connectivity and sense of

- place. Propose revisions to fee schedules to enable and promote redevelopment that complies with enhanced site design and mixed development standards.
- D The County shall develop and implement local assistance programs to support the physical redevelopment of existing businesses within target areas by 2006.
 - E The County shall continue to invest in a full range of infrastructure to support the development of target areas and to promote the intense development of target areas for high tech industries.
 - F The County shall pursue the development of an Economic Redevelopment Overlay District for targeted redevelopment areas that provides opportunities for redevelopment of properties (that are difficult to develop under current zoning regulations) by way of easing the requirements for setbacks, open space, landscaping, parking, and building height.

Policy ECM 4.3 Target Industries The County shall define Target Industries and the specific businesses offering high wage jobs by adopting specific recruitment and retention guidelines. A catalogue listing the specific companies that fit the profile of targeted Industries shall be developed by 2006. (*Exhibit ECM Target Industries*)

Policy ECM 4.4 Target Occupations The County shall continue to diversify its tax base by promoting advanced technology industries which provide quality occupations with above averages wages for its residents. The County shall annually review employment opportunities within the ever changing field of technology to remain on top of professional trends in this arena.

OBJECTIVE 5 HIGHER INTENSITY PLANNED DEVELOPMENT AREAS

The County shall continue to monitor and evaluate the development of Higher Intensity Planned Development areas to ensure that Target Industries and Occupations are able to develop the Target Areas as economic growth centers.

Policy ECM 5.1 The County shall review the original direction and purpose of Higher Intensity Planned Development future land use to learn if it is being developed by target industries as intended.

Policy ECM 5.2 The County shall evaluate and propose or revise as necessary, comprehensive plan policies during the Evaluation and Appraisal Report process to preserve HIP land use for the location of target industries to expand the economic capacity of the County.

Policy EMC 5.3 The County shall continue to evaluate the economic affect of the design standards set forth in the Policy FLU 5.13 on the development of Target Industries in Higher Intensity Planned Development areas.

OBJECTIVE 6 SUPPORT SMALL BUSINESSES AND EXISTING BUSINESSES AND TOURISM

The County shall create an economic environment that promotes the formation and expansion of small businesses which provide diverse job opportunities and help to define the image of Seminole County within the region. The County will also continue to promote Seminole County as a destination for tourism as well as support the tourism industry in the region.

Policy ECM 6.1 The County will promote small businesses by clarifying and streamlining the requirements for home occupations. By 2006, these regulations will be analyzed from the perspective of protecting neighborhoods and promoting small and new businesses development.

Policy ECM 6.2 The County will continue to support incubator programs through local colleges and the US Small Business Administration by tracking the number of new businesses started and businesses lost, the number of clients served and other results.

Policy ECM 6.3 The County, through its Economic Development Department will develop and implement local financial and technical assistance programs to support the physical redevelopment of existing and/or expanding small businesses through partnerships forged with the local banking profession.

Policy ECM 6.4 The County will continue to support the Tourist Development Council Convention and Visitors Bureau and continue to use the Tourist Development Tax to provide advertising and infrastructure to promote tourism.

Policy ECM 6.5 The County will continue to promote eco-tourism businesses and opportunities while balancing the need to protect the natural beauty found in the County. The County will monitor the number of out of County visitors enjoying County recreational facilities.

Policy ECM 6.6 The County will monitor the number of responses from promotional materials supplied to the Tourist Development Council Convention, the Visitors Bureaus in Longwood, Orlando Sanford International Airport and the County's Tourism website.

OBJECTIVE 7 PROVIDE PUBLIC INFRASTRUCTURE TO ENSURE THAT THE NEEDED INFRASTRUCTURE IS AVAILABLE TO ACCOMMODATE BUSINESS EXPANSION AND NEW BUSINESSES IN TARGET AREAS.

Policy EMC 7.1 The County shall continue to invest in a full range of infrastructure such as roadway, stormwater and fiber optic cable systems, to support the development of target areas and to promote the intense development of target areas for high tech industries.

Policy EMC 7.2 The County shall continue to be the regional leader in developing reliable and efficient transportation and multi-modal systems to be used by employees, customers, goods and services.

Policy EMC 7.3 The County will continue to support the economic efforts of the Orlando Sanford International Airport and its Foreign Trade Zone by assisting in providing public infrastructure to serve it, such as the extension of Lake Mary Boulevard to SR 46.

Policy EMC 7.4 The County shall analyze the potential for adopting and sharing in the cost of master stormwater systems located off site to allow more efficient site design and better use of valuable road frontage in target areas of the County, including the US 17/92 CRA.

OBJECTIVE 8 BUSINESS INCENTIVES

Policy ECM 8.1 Provide Incentives to Target Businesses with High Wage Jobs in Target Areas

The County will:

- A Annually evaluate the performance of the Job Growth Incentive Program which aims to reduce the costs of business that create Target Occupation Jobs in Target Areas. Monitor the number of Target Occupation Jobs created, retained and relocated as part of the Program.
- B Endeavor to increase the per capita personal income on a Countywide level.
- C Continue to provide public infrastructure in Target Areas and review the dollar value of infrastructure development in the CRAs, Target Areas and Municipal Economic Zones annually.
- D Consider revisions to fee schedules to enable and promote redevelopment that complies with enhanced site design, while encouraging small, home-based businesses as part of the update to the Land Development Code.
- E Develop and maintain incentive programs that encourage the use of enhanced site design principles within the target areas, specifically within the US 17-92 CRA, for large and small scale redevelopment.

OBJECTIVE 9 WORKFORCE DEVELOPMENT

The County and its citizens will benefit from a well-trained and competitive workforce from which Target Industries can draw skilled employees. This focus will attract new businesses to the County and improve the employment value of the individual citizen. The County will:

Policy ECM 9.1 Continue to offer the “quick response” job training program offered through SCC and track the number of trainees and businesses served.

Policy ECM 9.2 The County shall continue to strengthen relationships between the education communities, public agencies and the business community. By 2006, the County will form a committee with representatives from Seminole Community College, the University of Central Florida, Small Business Administration and the Seminole County Economic Development Department to foster education and employment opportunities.

Policy ECM 9.3 Continue to monitor unemployment, wages and the number of graduates within Seminole County.

Policy ECM 9.4 Partner with the Seminole County School Board in the development of programs which will provide local/regional information to students regarding the changing needs of local/regional industry and employers.

OBJECTIVE 10 EXPAND EMPLOYMENT OPPORTUNITIES IN COMMUNITY REDEVELOPMENT BLOCK GRANT AREAS

Policy EMC 10.1 The County will continue to apply for Community Development Block Grants to assist with economic development projects in these designated areas.

Policy EMC 10.2 The County will continue to provide assistance to challenged citizens through the Self Sufficiency Program and the Business Incubators through its Community Resources Division.

Policy EMC 10.2 The County will continue to support Job Fairs and educational opportunities aimed at economically depressed areas. The County will provide technical assistance to those local programs that provide training to citizens, including minorities and people with disabilities and coordinate the process of maintaining existing and encourage the creation of new technical and vocational educational programs.

Policy EMC 10.3 The County will coordinate with Workforce Central Florida to develop and allocate the necessary resources to guide local workforce development and promote development and enhancement of productive relationships between potential and current employers and employees.

Policy EMC 10.4 The County will provide the public infrastructure needed to stimulate the creation of new jobs and promote revitalization of economically distressed areas.

Policy EMC 10.5 The County will continue to promote mass transit to Community Development Block Grant areas providing affordable means of transportation to and from employment centers.

OBJECTIVE 11 RETAINING AGRICULTURAL BUSINESSES IN SEMINOLE COUNTY

Policy EMC 11.1 The County will include the history of agriculture as part of the Cultural History of Seminole County to add dimension to the quality of life offered by the County.

Policy EMC 11.2 The County will review and/or research the possibility of incentives to maintain the feasibility of agricultural businesses within appropriate areas of the County as part of the Evaluation and Appraisal Report (EAR) process.

Policy EMC 11.3 The County will promote the economic value of agriculture through education and marketing endeavors of the Economic Development Department.

Policy EMC 11.4 The County will provide a clearinghouse of information and resources to businesses in the agricultural field to sustain the industry.

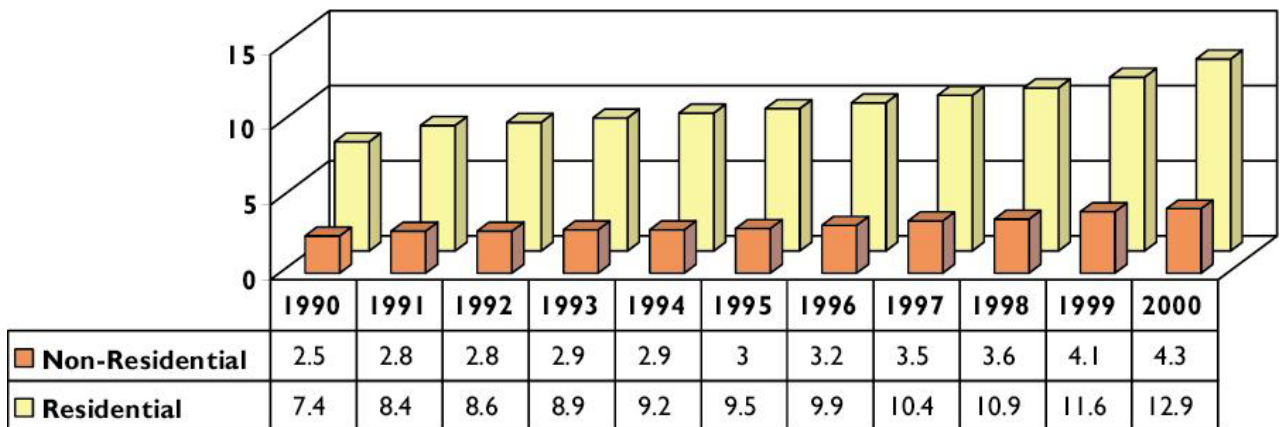
Exhibit EMC Assessed Property Values

ASSESSED PROPERTY VALUES

Residential and Non-Residential Properties

1990-2000

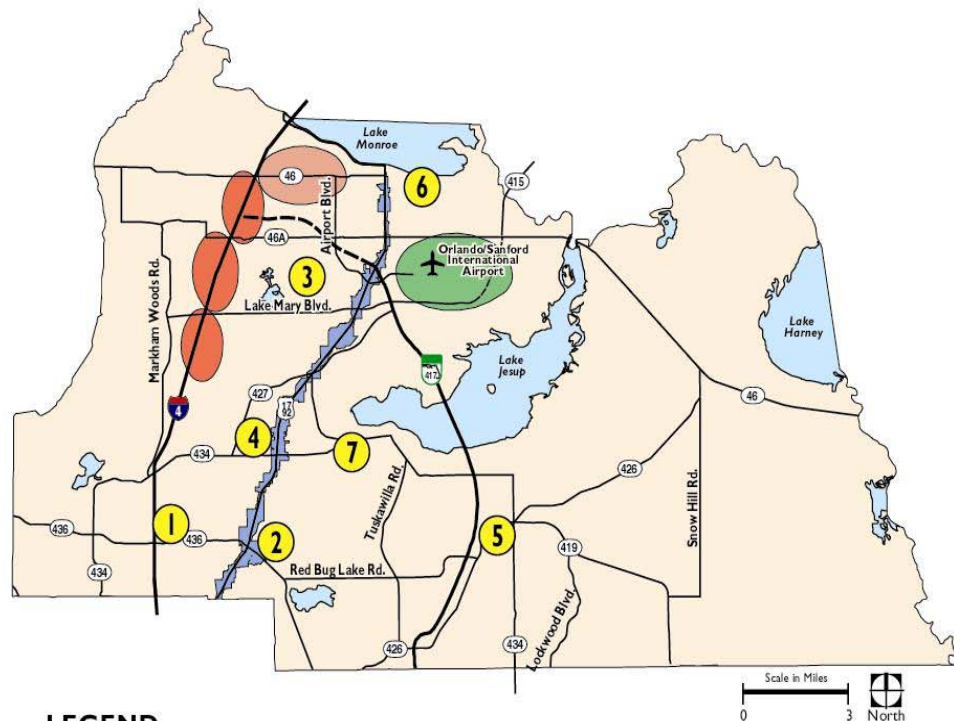
(\$ billions)




Source: Seminole County Property Appraiser
Real Estate Research Consultants, Inc.

Exhibit ECM Target Areas

TARGET AREAS



LEGEND

-  North I-4 Target Area - High Tech
 North I-4 Target Area - Industrial
 Airport Target Area
 US 17/92 Target Area

- 1 Altamonte Springs
- 2 Casselberry
- 3 Lake mary
- 4 Longwood
- 5 Oviedo
- 6 Sanford
- 7 Winter Springs

Exhibit ECM Target Industries

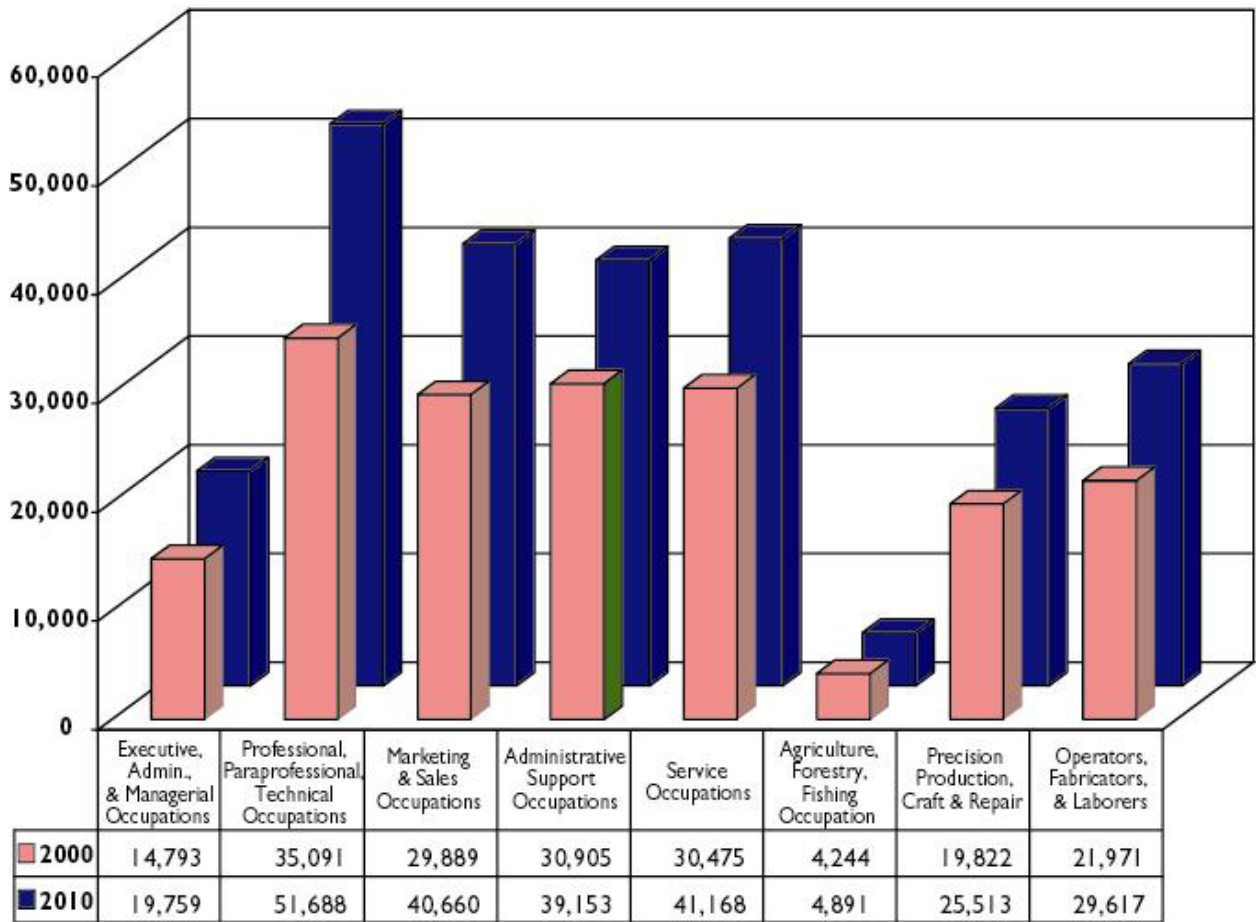
2003 - 2005
TARGET INDUSTRIES
SEMINOLE COUNTY

- Research Development and Testing
- Space Technology, Aviation and Aerospace
- Simulation, Modeling and Training
- Laser Technology
- Photonics
- Computer Software
- Computer Hardware
- Medical Labs and Technology
- Communications

Exhibit ECM Employment by Occupation

EMPLOYMENT BY OCCUPATION

Seminole County
2000, 2010



Source: Florida Department of Labor and Employment
Real Estate Research Consultants